PARALEGAL CHECK LIST

Schedules are consistent with the initial intake sheet and the client intake sheet ____________	If client has not provided copies of deeds and titles, then a letter is sent requesting the deeds and titles ________
Reviewed attorney notes to make sure all identified issues are covered ___________	Are all priority creditors listed on schedule "E" specifically treated in the plan __________
All new information provided by client in database is reflected in the schedules ____________	Are all secured creditors listed on schedule "D" specifically treated in the plan __________
If there is no market analysis, the tax assessment is attached and consistent with schedule "A" __________	Other creditors listed on schedule "D" or "F" specifically treated in the plan _________
Adequately addressed any equity in schedule "A" __________	Unsecured creditors in different classes are accounted for in the plan __________
Blue Book value attached to schedule "B" ______	Co-Debtors specifically treated in the plan ______
Household Goods List attached to schedule "B" __________	Student loans specifically treated in the plan______
Retainer Agreement attached to 2016(b) Statement	Plan payment amount/length of plan funds the plan ________
2016 (b) Statement is accurate and consistent with accounting records __________	Plan payment amount/length of plan matches schedule "J" __________
Were inquires made to obtain mortgage arrears figures __________	Plan payment amount includes all disposable income________
If mortgage arrears figures are not available, letter is sent requesting figures________	Motions To Value Collateral in cram-down cases prepared__________
Schedules are consistent with each other _________	Motions To Determine Secured Status in cram-down cases prepared __________
All personal property with liens listed on schedule "B" is reflected on schedules "D" & "J" __________	Motions To Avoid Liens in non purchase money security interest in household goods cases prepared__________
All real property with mortgages listed on schedule "A" is reflected on schedules "D" & "J" __________	For business cases (sole proprietorships) ,all business inventory and assets are listed on schedule "B" ________
Leases listed on schedule "G" __________	For business cases (sole proprietorships), schedule of business expenses is prepared and included in the schedules __________
Co-Debtors listed on schedule "H" __________	For business cases (sole proprietorships), all estimated taxes are paid and estimated quarterly returns are filed ________
Pay stubs and other income documentation attached to schedule "I" __________	For business cases (sole proprietorships), if taxes are not paid, they are addressed in the schedules___
Income for non-filing spouse/significant other included on schedule "I"________	For business cases (sole proprietorships), client told to file operating reports and provided with the operating report form _________
Expenses for non-filing spouse/significant other included on schedule "J"________	For business cases (sole proprietorships), if estimated taxes are not paid, then they are adequately addressed in the schedules________
Credit Union deductions and Saving Plans are included on schedule "I"__________	For business cases (sole proprietorships), client has provided tax returns for the last two years______
Credit Unions and Savings Plans payment are not included on schedule "J" __________	For business cases (sole proprietorships), if client has not provided tax returns for the last two years, a letter is sent to client requesting the information___
Letter sent to client and credit union requesting that deductions be stopped________	Letter to client explaining duties, responsibilities In reviewing petition, schedules etc. __________
Proofs of claims for all priority creditors prepared for filing and note that attorney is filing claim ____	Client is aware of time frame for filing documents with the court __________
Proof of claims for all secured creditor prepared for filing and note that attorney is filing claim ______	Letter prepared reminding client when to start making post–petition payments and plan payments ________
Client has provided copies of deeds and titles for real and personal property and the information is consistent with schedules________	Client is sent date- stamped copy of petition, statement of affairs and schedules __________